## OPEN ENROLLMENT STEPS FOR MOBILE

Once a year, open enrollment allows you to update your benefit elections. During this period, you will receive a task in your **Inbox**. You may make your elections and it is possible to change your elections up to the Open Enrollment end date.

Open Enrollment is also a good reminder to update any emergency contact and dependent information in Workday prior to electing your benefits for the next year. You may update your dependent information in the **Benefits** app on your Workday home screen.

Be sure to view the **Benefit Guide** on **BEN** for more information about plans. To complete your open enrollment:
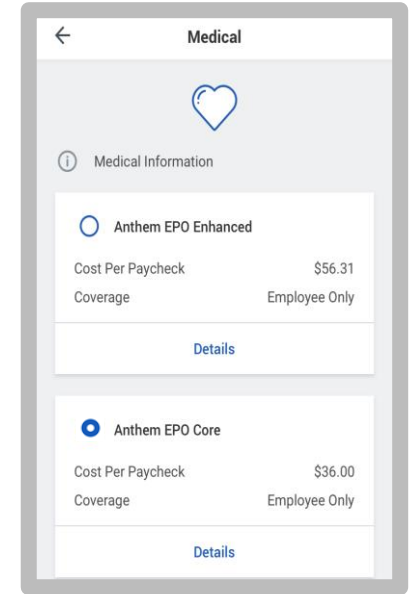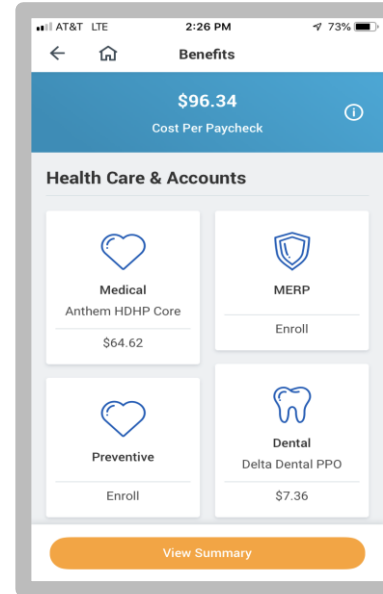
SELECT YOUR BENEFITS

From your Workday app home page:

1. Click **Inbox** icon ⊟.

2. Click the **Open Enrollment Change** task.

3. Click **Let's Get Started** and then answer the **Tobacco Use** question. Click **Save** after selecting your answer.
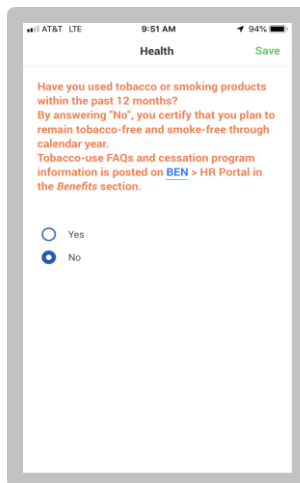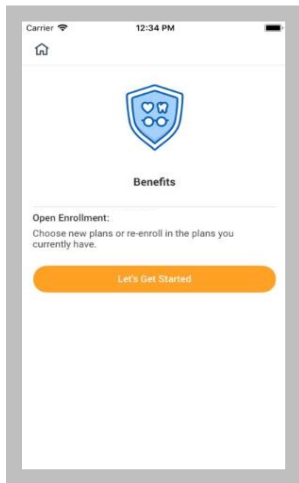
4. Click the category icons to make your elections.
    *Workday will default to your current elections

5. Within the categories, click the button ⦿ next to the plan you would like to **Elect**. Or you may choose **Waive** at the bottom of each section.

6. After electing your plan, click **Save** to return to the benefit category screen. You may click **Cancel** to return to the previous screen. You may go back to the same category and click **Edit** to modify your plan, if needed.

> Note: When electing a plan you may be prompted to add dependents. You may select **Existing Dependents** or **Add New Dependent**. See the Dependent section below for more information.

INFORMATION FOR ELECTING MERP

Does your spouse have group medical coverage available from their employer? Are you currently paying the Supplemental Spousal Premium? If your answer is "YES" to either of these questions, the **Medical Expense Reimbursement Program (MERP)** could be a good option for you!

More information about **MERP** can be found on **BEN** under the **HR Portal**.

You qualify for MERP if:

- You have access to your Spouse's group medical coverage.
- Your Spouse's group medical coverage does not include an HSA, is not through Medicare, Tricare, or an individual plan.
- You are currently enrolled in a Baptist Medical Plan or are a new employee

*For current employees, only you and your dependents currently covered by a Baptist group health plan are eligible to be enrolled in MERP

TO ELECT MERP:

1. Verify you have selected a qualifying medical plan or have waived all medical plan coverage

2. **Elect** the **MERP** plan that applies to you.

3. Under the **Coverage** field **prompt** icon ☰ , choose who you would like the MERP plan to cover.

4. After choosing coverage, under **Existing Dependents** choose your dependent(s) to add.
   If you choose **Employee Only** coverage for **MERP** you will not need to select **Dependents**.

5. After electing your plan, click **Save** to return to the benefit category screen. You may go back to the same category and click **Edit** to modify your plan, if needed.

Eligibility information for MERP:		
If you elect medical coverage for:	**You are eligible to elect this MERP plan**	**You may choose the MERP Plan to cover:**
Employee Only	MERP - J & K (If Elected Medical - Employee Only)	Spouse Only, Child(ren) Only, or Spouse & Child(ren) Only
Employee + Child(ren)	MERP - J & K - Spouse Only (If Elected Medical - Employee + Children)	Spouse Only
Waive medical coverage	MERP - J & K - All Coverages (If Waived Medical)	Employee Only, Employee + Spouse, Employee + Child(ren), Family
Family	You would not be eligible for MERP	
Employee + Spouse	You would not be eligible for MERP	

ADD OR MODIFY DEPENDENTS

If you elect or modify a benefit plan during open enrollment, you can add dependents or modify your existing dependents.

1. Select your new benefit election or click the **Edit** link for an existing benefit election.

2. Click **Add New Dependent**, select an existing dependent, or deselect an existing dependent. Complete all required information.

> Note: Workday selects a coverage automatically, based on who you cover for your plan
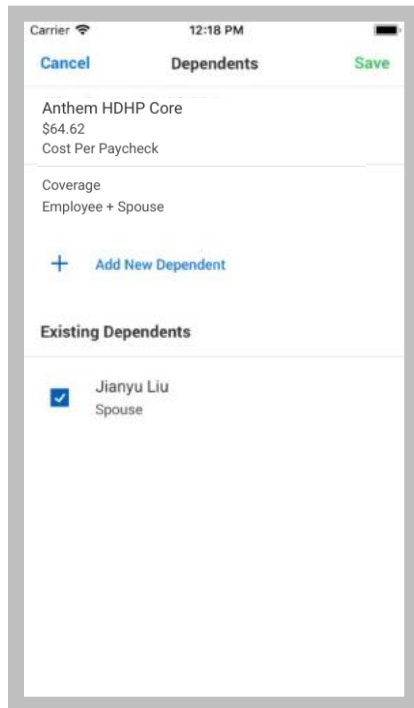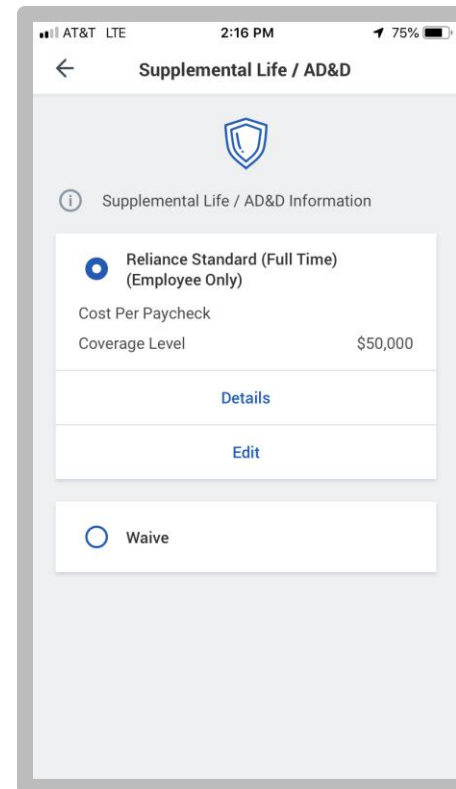

3. Click **Save** to return to the benefit category screen.

ADD GROUP LIFE INSURANCE

From the Insurance & Retirement section, select a category to open your enrollment options.

1. **Elect** or **Waive** for each insurance election and click **Edit to** modify your Coverage Levels, as needed.


4. Select your coverage and add **Beneficiaries/Dependents** as needed for each category. See below for more information on designating your beneficiaries.
5. Click **Save** when finished on each selection.

DESIGNATE LIFE INSURANCE BENEFICIARIES

From the Insurance & Retirement section, select each category to open your enrollment options.

1. For current enrollments, click **Edit** or **View** to modify your beneficiaries. For new enrollments, select the benefit option.

2. View and modify your primary beneficiary, secondary beneficiary, and the percentage of benefits for each. Your primary beneficiary and contingent beneficiaries must add up to 100%.
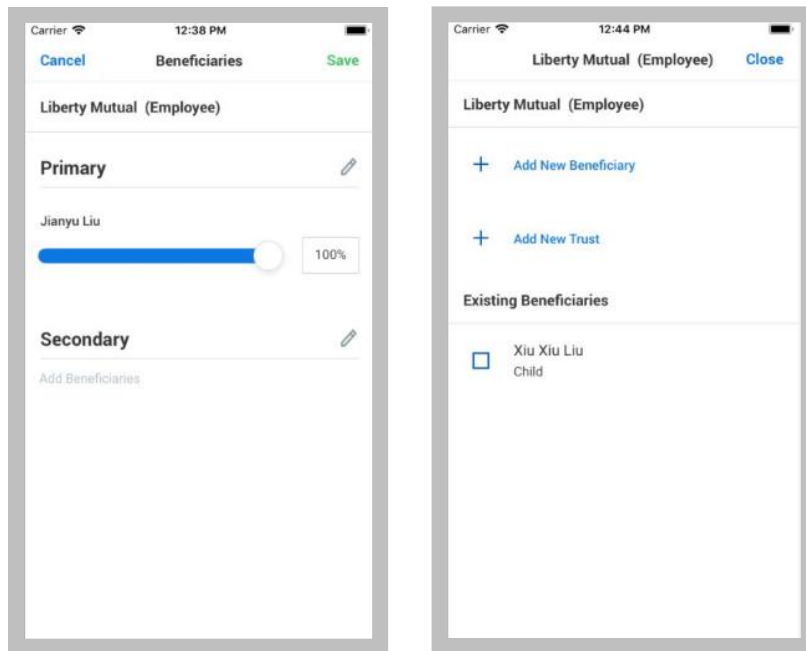
3. Click **Add Beneficiaries** to add a new beneficiary.

4. Select existing beneficiaries or add a new beneficiary. To add a new beneficiary click **Add New Beneficiary** or **Add New Trust**. To remove a beneficiary, unselect the checkbox next to that beneficiary.

5. Click **Close** and enter the percentage of benefits for each beneficiary.

6. Click **Save** to return to the benefit category screen.

ADD ADDITIONAL BENEFITS

The additional benefits section is where you can elect options such as Identity Theft protection. You can select or waive coverage for each category.

> Note: Closing the Workday app will not lose your progress. Anything you complete in the app will save automatically when you open it again.
>
> Though it saves automatically, you will need to complete and submit before the Open Enrollment end date.
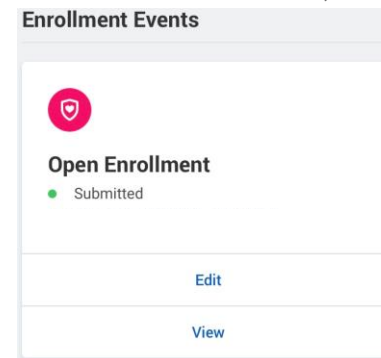
COMPLETE YOUR ENROLLMENT

1. Click **View Summary** at the bottom of the screen.

2. Scroll through the summary to review your **Selected Benefits, Waived Benefits, Total Benefits Cost**, and **Electronic Signature**.

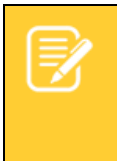3. Select the **I Agree** checkbox after reviewing the text to confirm your electronic signature.
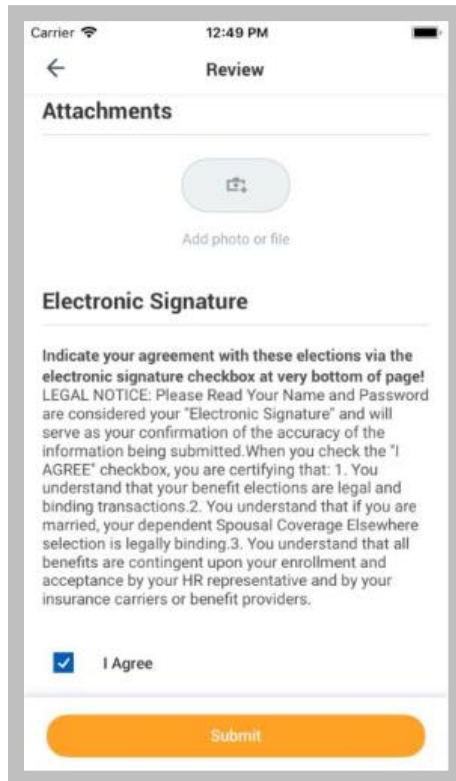
4. Click **Submit** and a confirmation page will display.

5. Click **Close** to return to your Inbox or you may view your **Benefits Statement**.

EDITING YOUR ENROLLMENT AFTER SUBMITTING

1. To edit your **Open Enrollment** elections after submitting, **but before the end date**, click on the **Benefits** app (click **View Apps** if Benefits is not listed under **Frequently Used**)

2. On **Enrollment Events**, click **Edit** under **Open Enrollment**

3. Step through the **Open Enrollment** screens and edit your elections as needed.

4. You must fully complete your enrollment and select **I Agree** on the **Electronic Signature** again to apply your changes.

> Note: After the Open Enrollment end date you are not able to edit or make changes to your elections during the next year unless you have a qualifying event.

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